Configuring and Using the SiteScape Portlet and Portal Tools

for the Viador E-Portal Suite TM

This document describes how to configure and use the SiteScape portlet and portal tools with the Viador E-Portal Suite.

This document presents information that is current as of the publishing date. SiteScape is committed to continuous improvement of its documentation. Please check our documentation web site for the latest revisions, documents, Help files, white papers, and more.

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Document Conventions

This document employs the following conventions:

What you see	What it means
general-summary tool	New terms and variable text (identifiers that need to be replaced with text specific to your needs) appear in *italic* font.
Set Preferences **Administer** **OK**	References to links, toolbar items, and buttons appear in **bold** font.

`/_viador/summary`
`/_viador/ptSummaryPrefs`
`PTU_SSF_`
	URLs, path and file names, and information you must enter on HTML forms or command lines appear in `Courier` font.

Chapter 1: What are SiteScape and WebWorkZone?

SiteScape Forum is Internet software that facilitates online work, bridging the gap between working alone at your computer and working with your teammates. Forum provides a fun and easy-to-use "virtual sharing place," where teammates can chat, have discussions, share documents, and work together online.

Using Forum, everyone has access to important threaded discussions and documents that are all located in one place. Anyone at any time can go back, review previous discussions, and understand why certain decisions were made and why work was done a certain way. Forum also makes it easy to keep track of new or modified items, to be notified of important changes, and to access previous versions of important documents.

Using Forum, you can have discussions with teammates, co-author documents, easily transfer files across the web, maintain a calendar of appointments, search Forum pages for documents and discussions, and customize and organize your virtual workspace so that it complements your natural way of working and collaborating with teammates.

WebWorkZone (WWZ) is our hosted service, offering your organization the power of SiteScape Forum and the convenience of SiteScape technicians handling the installation and server administration for you. Subscribers are responsible for zone administration tasks such as adding user accounts and creating forums.

How Do I Access SiteScape Software?

You can use the Viador E-Portlet Suite™ to access the portlet software on an existing Forum installation or on WebWorkZone. For information about purchasing Forum, contact the sales department at sales@sitescape.com.

For more information about installing and configuring a new version of Forum, see the SiteScape Forum Installation and Configuration Guide. For more information about SiteScape's hosted service, see our WebWorkZone home page.

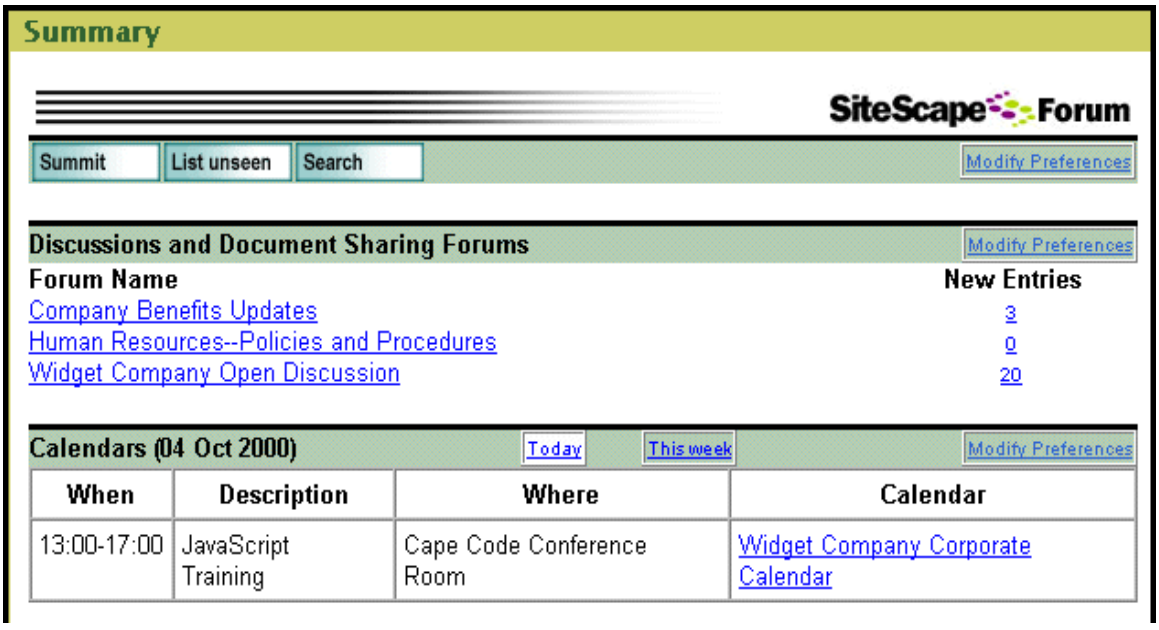
If you would like to take Forum for a "test drive" before making a decision, you can point the Viador E-Portlet Suite™ to an area on WebWorkZone that you can use without charge for 30 days. In this way, you can test SiteScape's software features before making a purchase. To do this, read the information in the sections that follow, then follow the instructions in the Testing Forum Using the Viador Demonstration Area section.

What are the SiteScape Portal Tools?

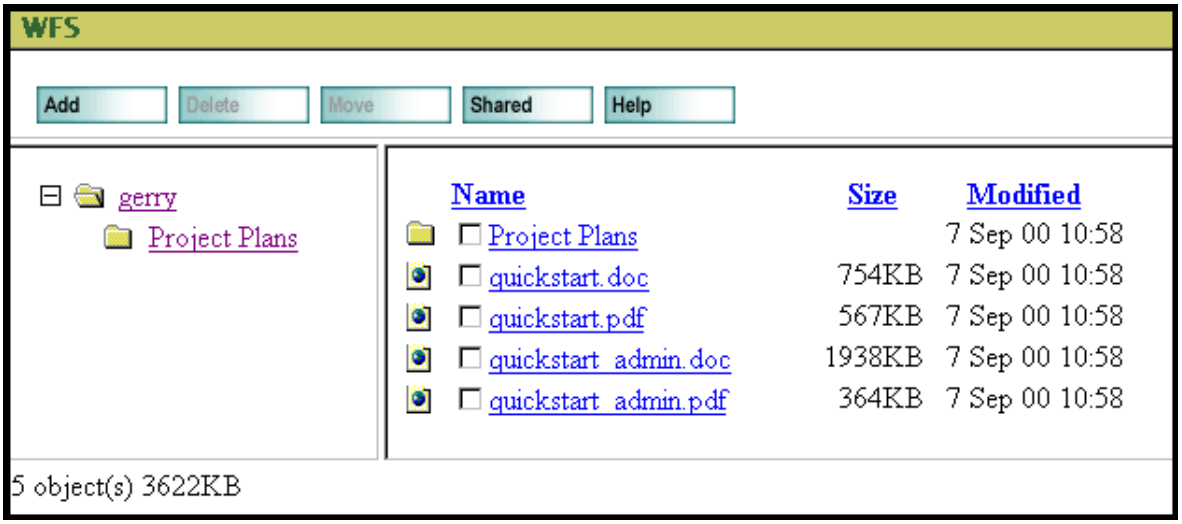
Using the Viador E-Portal Suite, there are three views into the SiteScape software. The first view is called the workspace page. You access this page by clicking on the Forum Portlet icon in the My Portlets section of your portal page. The workspace page is a table of contents

for all of the collaboration tools available to you in our software.When you click on the Forum Portlet icon, Viador displays the workspace page in a separate browser window, as follows:

The remaining two views are streamlined, customizable portal tools. The first type of SiteScape portal tool is called a general summary tool. This tool is a concise summary of Forum- or WebWorkZone-wide information and includes links to our most commonly used features. The general-summary tool allows you to access quickly only the areas of Forum or WebWorkZone that are most important to you, and that have new or modified information. The following is an example of the general-summary tool:



The second tool is called a web file tool and provides a streamlined view of your personal Web File System. You use your Web File System to share or transfer files across the web. The following is an example of the web file tool:


WFS
Add
Delete
Move
Shared
Help
gerry
Project Plans
Name
Size
Modified
Project Plans
7 Sep 00 10:58
quickstart.doc
754KB
7 Sep 00 10:58
quickstart.pdf
567KB
7 Sep 00 10:58
quickstart_admin.doc
1938KB
7 Sep 00 10:58
quickstart_admin.pdf
364KB
7 Sep 00 10:58
5 object(s) 3622KB

Chapter 2: Administration Guide

Before you can set up the Viador E-Portal Suite for use with Forum or WebWorkZone, the Viador E-Portal Suite administrator must do the following:

1. Copy the following SiteScape Forum ZIP file to the appropriate directory on the Viador system, and then unzip it:

   ```
   /avf/scripts/viador/SiteScape.zip
   ```

   This step is standard for implementing Viador's portlets. See the Viador documentation for more information about this process.

2. Read the `Readme_Forum.doc` file, which is included in the zipped files, and configure the portal so that the Forum Portlet icon appears in the My Portlets section of the portal page.

You can then configure and edit a SiteScape portlet and portal tool, as described in the following sections:

- Configuring the SiteScape Portlet
- Editing the SiteScape Portlet Configuration
- Configuring a SiteScape Portal Tool
- Editing a SiteScape Portal Tool Configuration

After you complete configuration of the SiteScape portlet and portal tools, read the User Guide section to learn how to provide Forum or WebWorkZone login information and use the tools.

Configuring the SiteScape Portlet

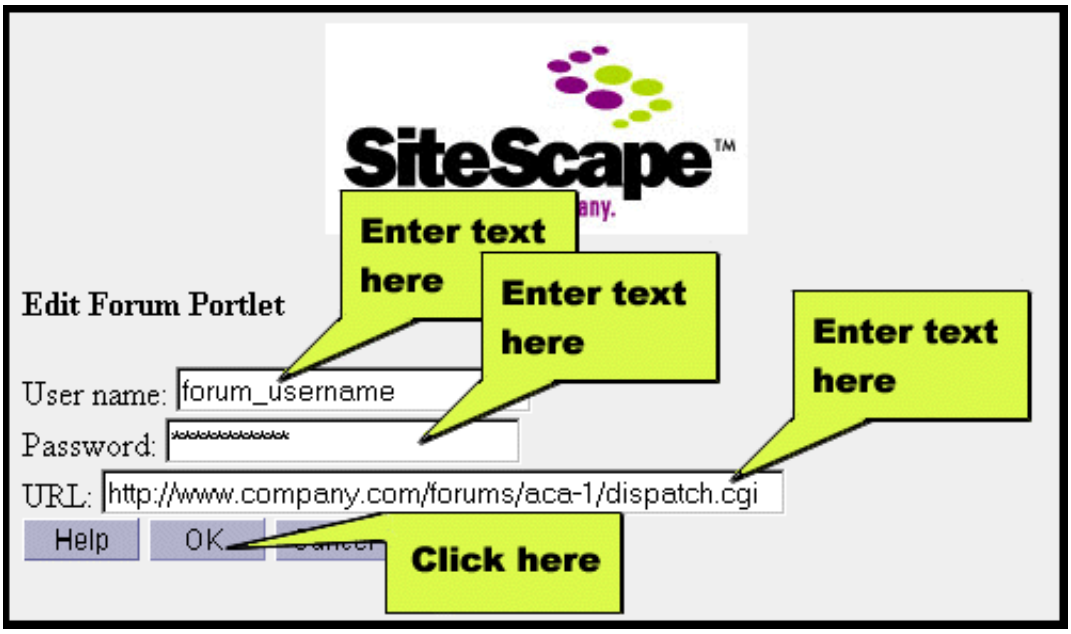
Before configuring the SiteScape portlet, be sure that the Viador E-Portal Suite administrator configured the software so that you have access to the Forum Portlet icon in the My Portlets section of the portal page.

To configure the SiteScape portlet, follow these steps:

1. Log in to the Viador E-Portal Suite.
2. View My Front Page.
3. Click on the Forum Portlet icon in the My Portlets section of the portal page, as follows:

Note: *The pictures of the Viador E-Portal Suite are presented here to assist you in navigating the Viador pages and forms. If a displayed page is different from a picture in this guide, please refer to the Viador Help for more information about the described task.*

The "Edit Forum Portlet" page appears as follows:



Note: *After you complete the remaining instructions in this section, clicking on this icon results in Viador logging you into Forum and displaying the Forum page in a separate window.*

4. Enter your Forum or WebWorkZone username and password for Viador to use to log you into the SiteScape software automatically on future visits.

   Be sure to specify any uppercase letters in your Forum or WebWorkZone username or password (usernames and passwords are case-sensitive).

5. Enter the URL of your Forum or WebWorkZone workspace page, as follows:

   ```
   http://www.company_name.com/visible/aca-1/dispatch.cgi
   ```

Replace the italicized values with the values that you use in your Forum or WebWorkZone URL (for more information, see the Forum installation guide).

6. Click on the **OK** button.

   The SiteScape portlet is now configured. The configuration of this portlet enables you to create sections on the portal page that display the SiteScape portal tools.

Editing the SiteScape Portlet Configuration

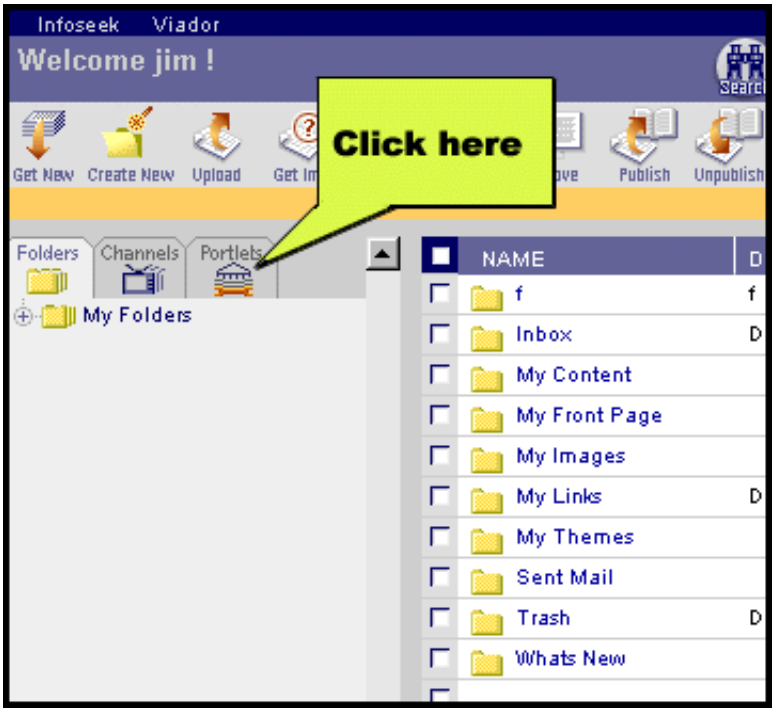
After the initial configuration of the SiteScape portlet, you may want to edit the configuration values. For example, users usually want to provide their own Forum or WebWorkZone username and password. As another example, you may want to specify another URL so that your portlet points to a different Forum or WebWorkZone installation.

To edit an existing SiteScape portlet configuration, do the following:

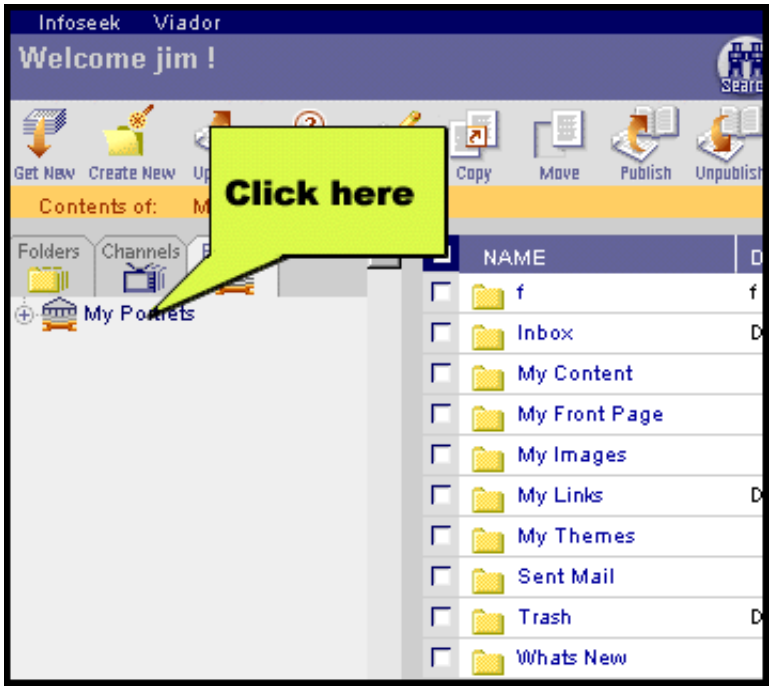
1. Log in to the Viador E-Portal Suite.
2. View My Front Page.
3. Click on the **Portal Explorer** toolbar button, as shown in the following picture:

   Viador displays the Portal Explorer page in a separate browser window.

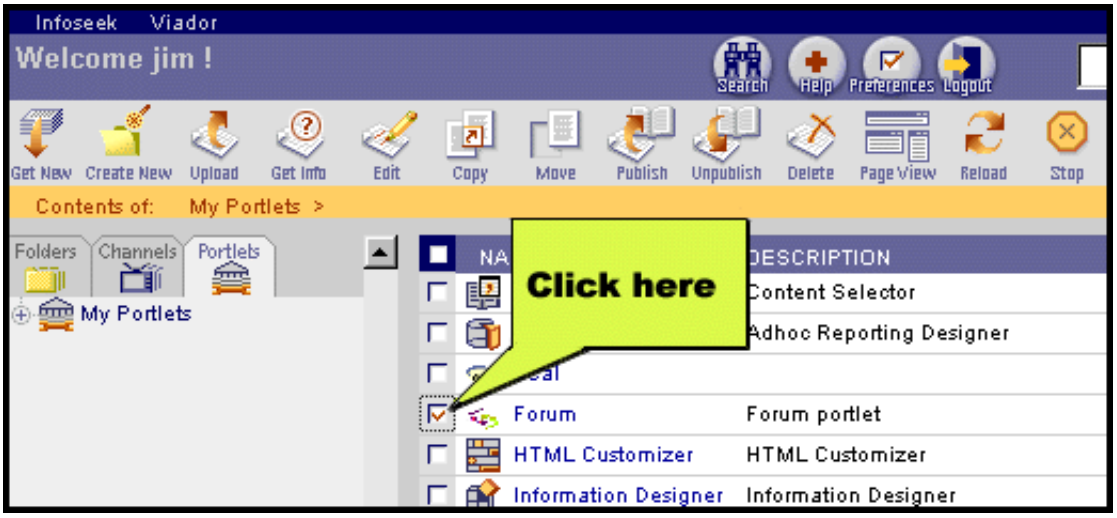
4. Click on the Portlets tab, located on the left side of the Portal Explorer window, as follows:



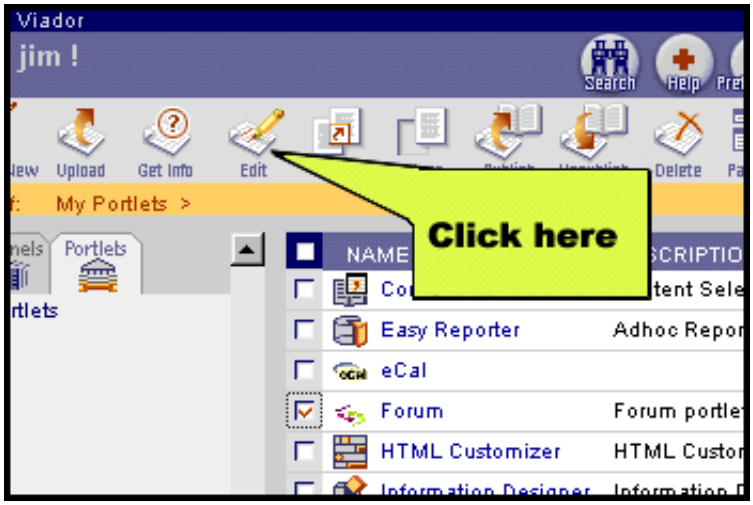
5. Click on the My Portlets link (do not click on the plus sign). The My Portlets link is located just below the tabs, as follows:



6. Click on the "Forum" checkbox, located to the right of the tabs, as follows:



7. Click on the **Edit** toolbar button, as follows:



Viador displays the "Edit Forum Portlet" page in a separate window.

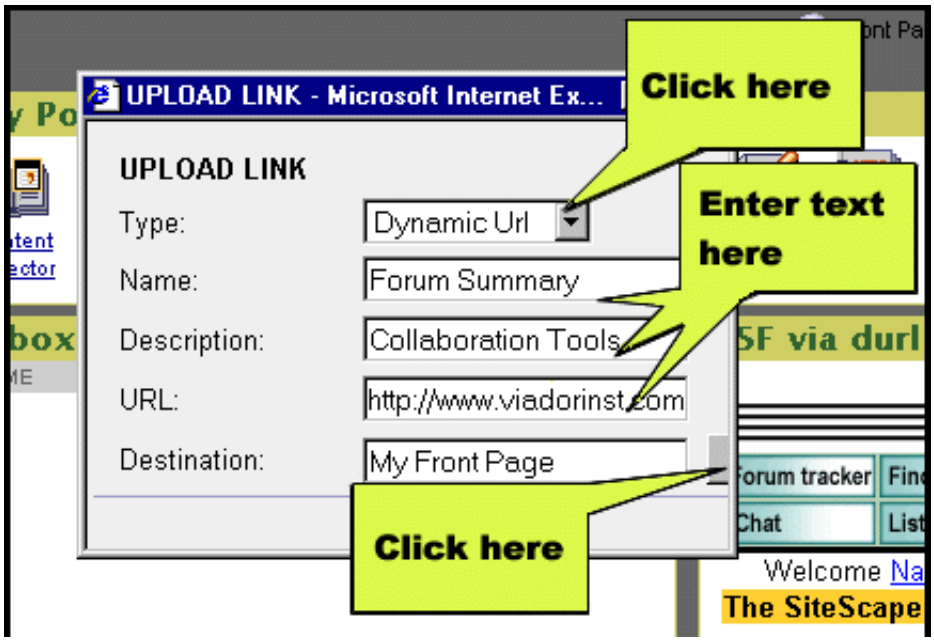
8. Specify values in the "Edit Forum Portlet" page, as described in the previous section.

Configuring a SiteScape Portal Tool

To create a section on My Front Page that displays a SiteScape portal tool, do the following:

1. Log in to the Viador E-Portal Suite.
2. View My Front Page.
3. Click on the Upload Link icon in the My Portlets section of the page, as follows:

The Upload Link window appears, as follows:



4. Specify the following values in the Upload Link window:

   Type

   Indicates the type of link specified.

   Click on the drop-down list and choose "Dynamic URL." Dynamic URLs support the passing of parameters that are needed to maintain your login and to display the SiteScape portal tools correctly.

   name

   Provides a title for the section of the portal page that contains the Forum tool.

   Description

   Provides additional information about the contents of the section.

   For example, if you specify the URL of SiteScape's discussion portal tool, you

can provide a description of the type of discussion taking place in that discussion area. As another example, if you specify the URL of SiteScape's web file tool, you can provide a description such as "Files to share and transfer across the web."

URL

Points to the installation of the Viador E-Portal Suite, and provides parameters indicating the SiteScape tool you want to access.

Each of the SiteScape portal tools requires a slightly different URL. Here is the general format of the URL presented on several lines so that it is easier to read (however, when you enter the URL, enter it as a single string, and do not include any spaces):

```
http://viador_install_url/servlet
/InfoServlet?ISSESSIONID={Session}
&obj=APPLICATION
&cartridge=cartridges.viador.SiteScape.Forum
&action=DEF
&tool=tool_spec
```

Be sure to specify upper- and lowercase letters as specified in this example.

Viador administrators can locate more information about cartridges in the *Readme_Forum.doc* file located in Forum's zip archive.

The following list describes the variable parts of the URL string shown previously

viador_install_url

The URL that you use to access your Viador E-Portal Suite.

tool_spec

Indicates the name of the SiteScape portal tool you want to display in this section of the page, and provides any parameters required by that tool.

The following are strings that you can specify in this part of the URL:

summary

Displays the general-summary tool.

wfs

Displays the web file tool.

If you choose, you can specify a URL that displays the workspace page inside the section of the portal page. When you do this, the functionality of our software is exactly the same as if you are accessing the workspace using a separate browser window. (The workspace page is not designed to present as concise a display as the Forum portal tools.)

To display a Forum or WebWorkZone workspace page inside the section of the portal page, specify the URL that follows, and note the different string presented in the last part of the URL. This URL is presented on several lines to make it easier to read. However, when you enter the URL, enter it as a single string, and do not include any spaces. Consider the following:

```
http://viador_install_url/servlet
/InfoServlet?ISSESSIONID={Session}
&obj=APPLICATION
&cartridge=cartridges.viador.SiteScape.Forum
&action=DEF
```

Destination

Indicates the Viador page on which you want to place the section containing the SiteScape portal tool. (The examples in this guide specify My Front Page.)

5. Click on the button that submits the form in the Upload Link window.

   At the time of this writing, this button is partially obstructed, and you cannot maximize the window. Just click on the portion of the button that is visible in the window, as shown in the previous picture.

   The SiteScape portal tool is now configured.

Editing a SiteScape Portal Tool Configuration

After the initial configuration of the SiteScape portal tool, you may want to edit the configuration values. For example, you may want to change the portal tool from a general summary to a web file tool, or you may want to edit the tool's title.

Editing a SiteScape portal tool configuration is very similar to editing the configuration of a portal. To edit the configuration of a SiteScape portal tool, do the following:

1. Log in to the Viador E-Portal Suite.
2. View My Front Page.
3. Click on the **Portal Explorer** toolbar button.

   Viador displays the Portal Explorer page in a separate browser window.
4. If the Folders tab is not already displayed, click on the Folders tab.
5. Click on the plus sign (+) next to the My Folders line.
6. Click on the plus sign next to the My Content line.
7. Click on the My Front Page text (do not click on the plus sign next to it).
8. On the right side of the window, click on the checkbox of the tool whose configuration you want to edit.
9. Click on the **Edit** toolbar button, located toward the top of the window.

Viador displays the **Edit Link** form in a separate browser window.

10. Change the values as desired.
11. Press the Tab key until you can view the **OK** button, then click on it.

    At this time, the **OK** button is not visible by default, and this window is not resizable. The Tab key allows you to move from line to line on the form.

    Viador implements your new configuration values.

Chapter 3: User Guide

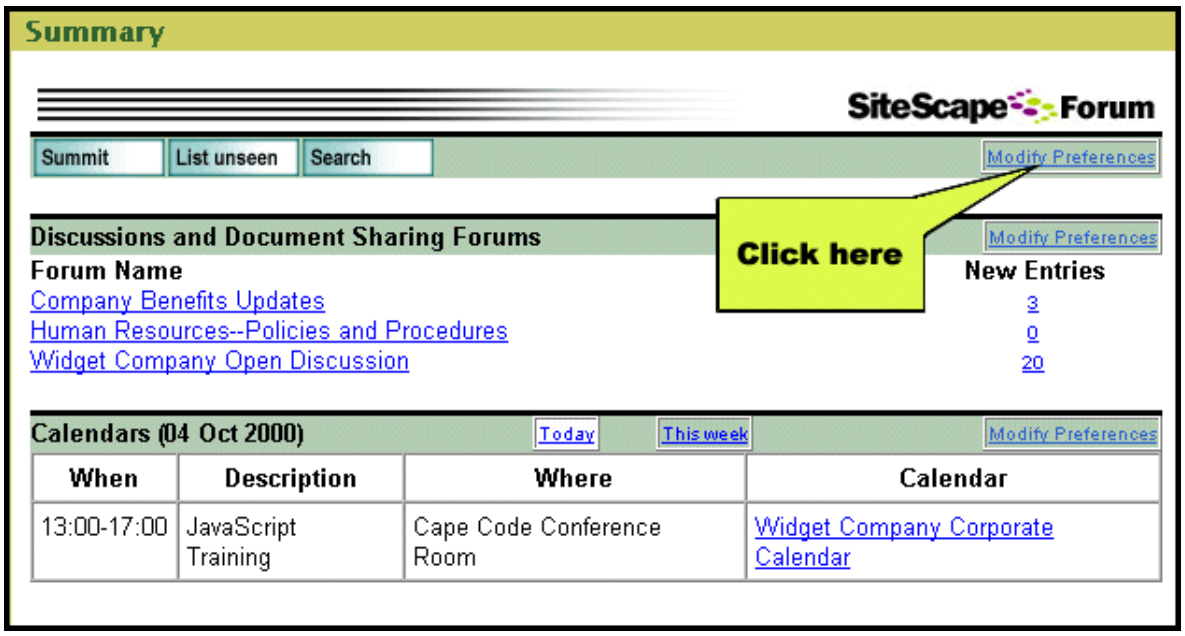
The following sections tell you how to use SiteScape portal tools and how to set your user preferences:

- Using the General-Summary Tool
- Using the Web File Tool

Using the General-Summary Tool

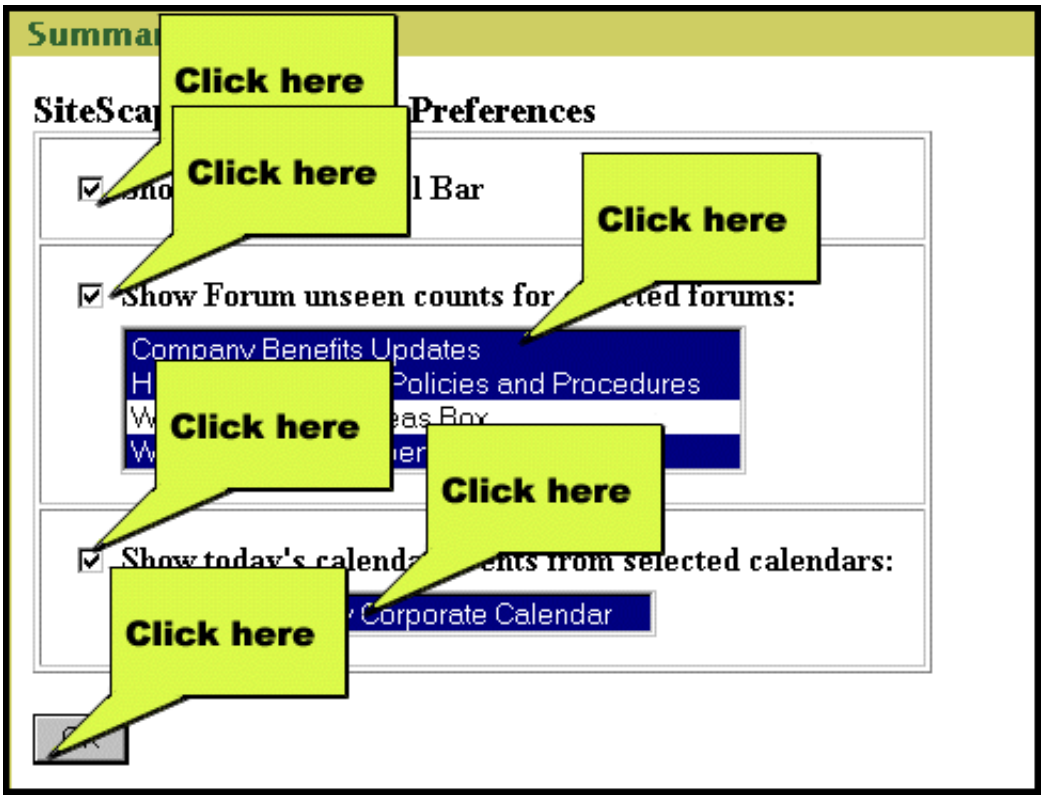
The general-summary tool provides you with a customizable, concise display of Forum- or WebWorkZone-wide summary information and links to Forum's or WebWorkZone's most commonly used features. To set up and use the general-summary tool, do the following:

1. Log in to the Viador E-Portal Suite.
2. View My First Page.
3. View the SiteScape general-summary tool, which is located on the page.
4. Click on one of the **Modify Preferences** links, as follows:



All three of the **Modify Preferences** links along the right side of the tool perform the same function.

5. Select the items you want to view using this tool, as follows:



The previous picture shows you how to view all of the optional information. Select only the options you wish to view using this tool. The optional information is as follows:

Forum Toolbar

Provides buttons that allow you to find information about other users, to search for discussion items and documents stored in Forum or WebWorkZone, to change Forum or WebWorkZone administrative settings (if you have enough privilege to do so), to log out of Forum or WebWorkZone, and to access the Forum or WebWorkZone Help system.

...unseen counts for selected forums

Provides a count of the new or modified items in a specific discussion area. In this way, you can track activity in the discussion areas that are of the most interest to you before actually viewing Forum's discussion pages.

If you want to choose more than one discussion area to track (and if you are using a Windows system), press and hold the Ctrl key, and click on the titles of discussion areas you choose, highlighting each one. (If you are using a system other than Windows, use the method of making multiple selections that is supported on your platform.)

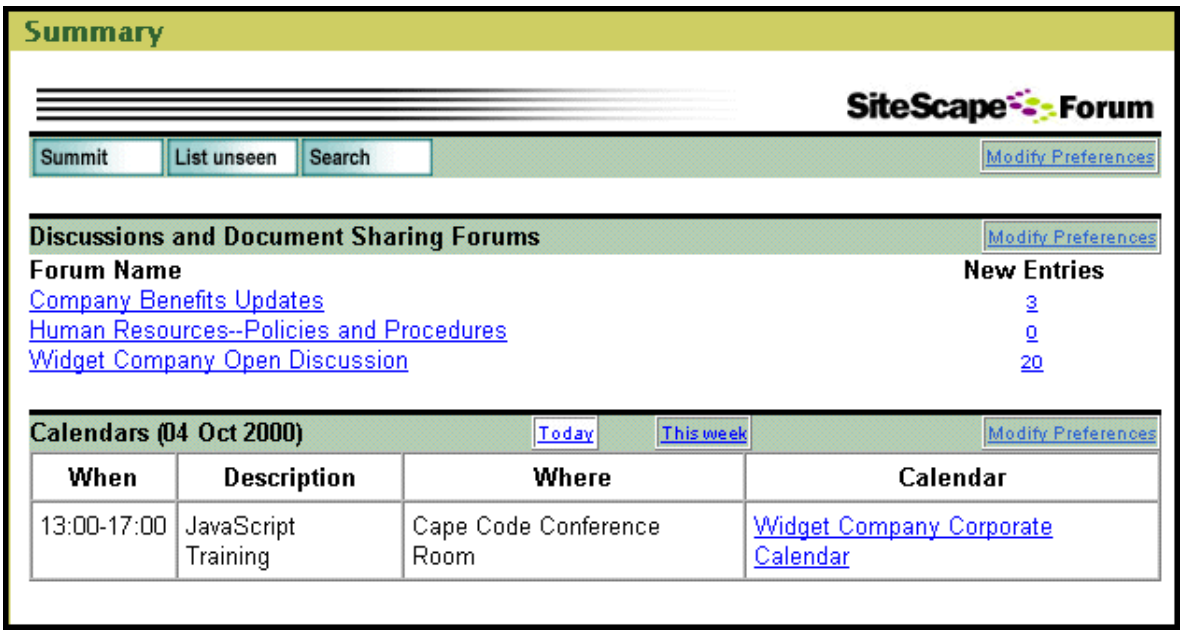
Calendars

Displays the appointments for the current day (by default). If you choose, you can display all of your appointments for the week.

6. When you are finished, click the **OK** button, as shown in the previous picture.

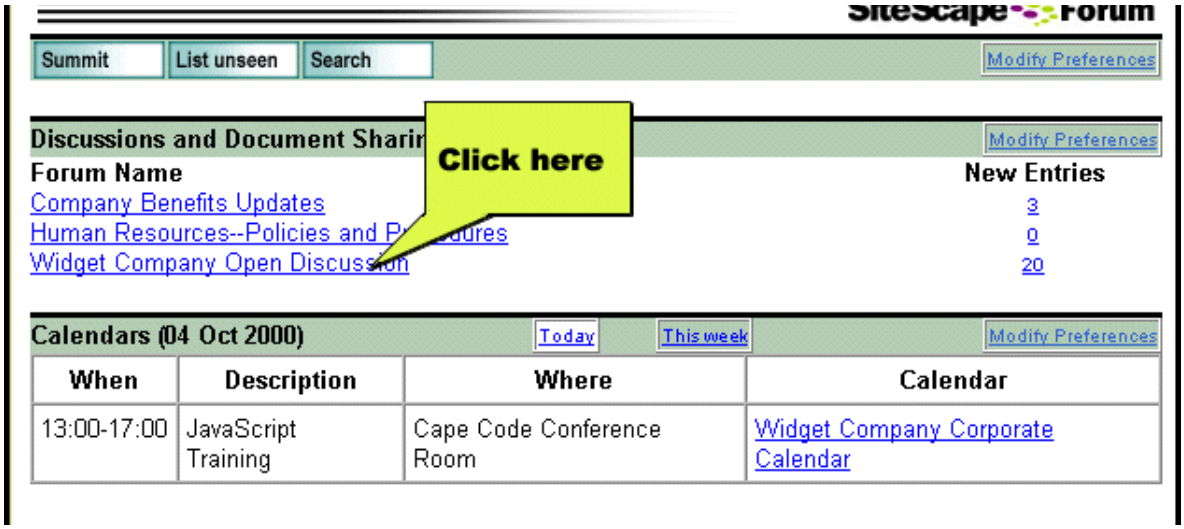
   Viador's My Page reappears.

Your SiteScape general-summary tool now displays information such as the following:

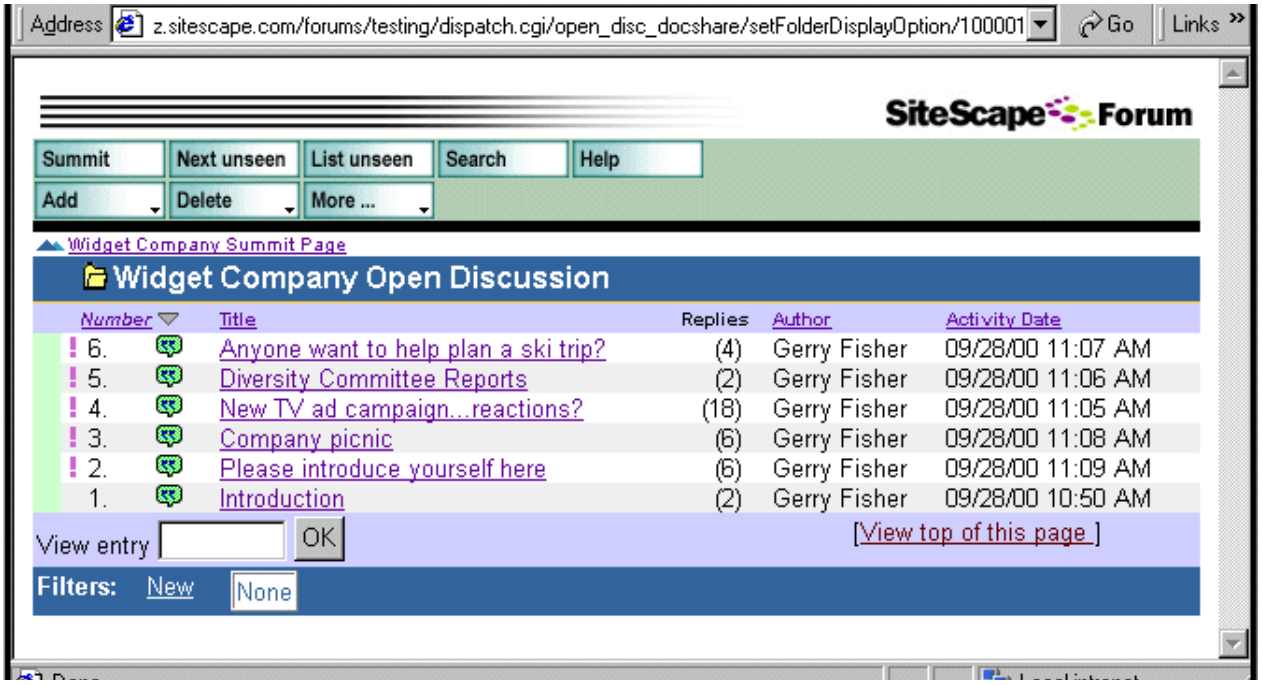


To access Forum or WebWorkZone to collaborate with your teammates, click on a button or link. So, to view an entire discussion area, click on its linked title. To view a list of the new or modified entries in that discussion area, click on the linked number in the "New Entries" column.

For example, let's say that you see that the "Widget Company Open Discussion" has 20 new or modified entries and you want to enter that discussion area. To accomplish that task, click on the linked title of that discussion area, as follows:



The SiteScape portal tool then displays the discussion area in general-summary tool's section of the portal window. (Since the summary tool's section of the portal window does not have scroll bars, you may want to right click on the link and open it in a separate browser window.) If you right click on the discussion area's link and open it in another window, it appears as follows:



The purple exclamation points (!) are icons that indicate new or modified topics that you have not yet seen.

If you need to change your Login information or your user preferences at some time in the future, you can click on the portal tool's **Modify preferences** link again.

Using the Web File Tool

The Web File portal tool provides a streamlined view of your personal Web File System, and you can use it to share or transfer files across the web. The user interface to the web file tool is virtually identical to the Web File System pages found when directly accessing a Forum or WebWorkZone installation. For more information on using these pages, click on the Help button.

Generally, the tool looks and functions like standard file-access software. To view a directory's contents or to view a file, click on its linked title. To view directory or document properties (which can be used to change the entry's name and the access-control settings), click on the folder or document icon. To add a file or to create a subdirectory, click on the **Add** toolbar button.

You can give other Forum or WebWorkZone users access to your web files. For example, you can set up your access controls so that selected co-workers can view the contents of some directories and so that the contents of other directories are for your private use.

If you have access to do so, you can view someone else's web files. To perform this task, click on the Shared toolbar button, and use the resulting form to specify the username or team name that corresponds to the web files you want to view.

Testing Forum Using the Viador Demonstration Area

If you would like to test Forum before purchasing our product or our WebWorkZone hosting service, you can point your portlet or portal tool to a demonstration area dedicated to Viador customers.

This demonstration area contains a mock "customer support forum" for your use. View entries, and add discussion topics, replies, and documents, if you wish.

If you would like to create a private discussion forum for use by only you and your coworkers, use the contact information provided toward the bottom of the Forum workspace page to obtain assistance.

The following instructions show you how to create a general-summary tool on your Viador E-Portal Suite using the Viador demonstration area:

1. Go to the Viador demonstration area (http://webworkzone.com/viador).
2. If you want to create your own username and password for use in this demonstration area, click on the **Register** button in the Login box located on the right side of the workspace page.

   If you do not want to create your own username and password, skip this step and the next two.

3. Provide a username, a full name, a password (specify this twice), and an e-mail address (some features of Forum will not function properly unless you specify your e-mail address). You can leave the rest of the form blank.

   Remember the upper- and lowercase letters in your username and password; these identifiers are case-sensitive.
4. Click on the **OK** button on the bottom of the form.
5. If you registered your own username and password, click on the **log in now** link on the Register User Status page.

   If you did not register your own username and password, you can specify our demonstration username and password in the login box located on the right side of the workspace page:

   Username: poirot

   Password: hercule
6. After you specify your username and password, click the **Log in** button.
7. View or create discussion topics, replies, and documents, if you choose.
8. View the Viador E-Portal Suite's My Front Page.
9. Configure the SiteScape Forum portlet using the instructions provided in the Configuring the SiteScape Portlet basis.
10. Upload a link for the Forum summary tool using the instructions provided in the Configuring a SiteScape Portal Tool section and specify the following at the end of the URL:

    ```
    ...&tool=summary
    ```
11. Set user preferences for the tool using the instructions provided in the Using the General-Summary Tool section.

(For information about purchasing Forum or about the WebWorkZone hosting service, see SiteScape's company web pages.)

Chapter 4: Testing the Portlets with WebWorkZone

If you would like to view or test the SiteScape portlet and have not purchased SiteScape Forum or WebWorkZone, you may sign up for a free 30-day trial of WebWorkZone. This trial is fully functional and allows you to create discussion forums, calendars, task forums, and chat rooms that you can then view using the SiteScape portlets.

To sign up for a free 30-day trial of WebWorkZone, do the following:

1. Direct your browser to http://webworkzone.com.
2. Click on the **Sign up now for a free trial of WebWorkZone** button.

   Your browser displays a sign-up form
3. Fill in the fields, then click on the **Next** button at the bottom of the page.

   Your browser displays the confirmation screen for your new WebWorkZone zone.
4. Print or bookmark this screen for future reference.
5. Click on the **OK** button.

   Your browser takes you to your brand-new WebWorkZone zone.

Before you use your new WebWorkZone zone with your Viador E-Portal Suite, you must contact SiteScape by email at support@webworkzone.com. There is a simple but important change we need to make to your zone to ensure compatibility.

(For information about purchasing Forum or about the WebWorkZone hosting service, see SiteScape's company web pages.)

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